Illinois Lobbyists
Electronic Expenditure Filing Instructions

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Secretary of State
State of Illinois
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INTRODUCTION

This Guide provides information explaining how to prepare reports in the most efficient manner in an effort to maintain compliance with the Lobbyist Registration Act. Included are copies of the website screens that will be used to perform the data entry requirements. The review of this guide, prior to entering the reporting system, should help you prepare for filing and reduce questions that may arise during the filing process.

A registrant’s Authorized Agent must file an expenditure report even if no reportable expenditures were incurred during the reporting period. The report should contain the reportable expenditures of all the entity’s lobbyists. Lobbyists registered exclusively under an entity are not required to submit their own report.
EXPENDITURE INFORMATION

Entity Responsible For Reporting

The reporting of expenditures is determined by who actually made a reportable expenditure. Specifically:

- If an expenditure is made by a registered entity or by that entity’s exclusive lobbyist, the expenditure is reported by the registered entity.
- If an expenditure is made by a contractual lobbying entity and a client did not reimburse the contractual lobbying entity, the contractual lobbying entity reports the expenditure.
- If an expenditure is made by a contractual lobbying entity and a client reimbursed the contractual lobbying entity during the reporting period, the client reports the expenditure.

Non-reportable Expenditures

Examples of non-reportable expenditures include the following:

- Campaign contributions;
- Lobbyist's personal expenses;
- Office, clerical or support staff expenses;
- Salary, fees and other compensation paid to registrant for lobbying; or
- Expenditures made on behalf of an official that are returned or reimbursed prior to the filing deadline for submission of the report.

Reporting Schedules

Expenditure reporting is performed by using the different types of schedules and reports listed below:

- **Itemized Schedule** – Use this schedule to report any single, individual expenditure made on behalf of an “Official.”
- **Large Gatherings Schedule** – Use this schedule to report expenditures incurred when hosting a reception or benefit to which 25 or more “Officials” are invited.
- **Giveaways Schedule** – Use this schedule to report expenditures incurred for generic gifts, product samples or substantially identical items given to 25 or more “Officials.”
- **Grass Roots Lobbying Statement** – Use this statement to report an expenditure made by an individual who participates in a Grass Roots communication and makes an expenditure on an “Official” during a Grass Roots communication or event sponsored by the registered entity. These statements allow member organizations or individual members to make and report expenditure(s) through the registered umbrella organization without having to register themselves as lobbyists.
- **Expenditure Summary Report** – This report summarizes the amounts of all reported expenditures by category. The report is automatically generated from the expenditures entered into the system through the above-mentioned schedules.
Report Deadlines/Late Fees

Expenditure Reports are required as follows:

- Expenditure reporting is semi-monthly.
- All reports must be filed by 11:59 p.m. on the day of the filing deadline. There is no extension of a filing deadline when holidays or weekends are part of the filing period.
- Entities that fail to file expenditure/activity reports by the required deadlines are subject to a $50 late fee. Filings submitted more than 15 days after the deadline also will be charged a $100 penalty fee when submitting the report.

Expenditure Reporting Calendar

<table>
<thead>
<tr>
<th>Reporting Period:</th>
<th>Filing Period Opens:</th>
<th>Filing Deadline (11:59 p.m.):</th>
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<td>January 1 – 15</td>
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Officials Required to Report

The electronic expenditure reporting system provides a reporting mechanism only for Officials or Official Titles, which are listed on pages 27 - 28. If expenditures were made on behalf of other individuals, they are not required in an expenditure report.

Notification to an Official

The law requires that lobbyists who make an expenditure on behalf of an official must inform the official in writing contemporaneously with the official’s receipt of the expenditure, that the expenditure is a reportable expenditure and that the official will be included in the report submitted to the Secretary of State.

Within 30 days after a filing deadline, each official shall again be notified that an expenditure made on his or her behalf has been reported. No specific notification form is required; however, the notification should include the name of the lobbying entity, the total amount of the expenditure, the date on which the expenditure occurred, a description of the expenditure, location of the expenditure, and the subject matter of the lobbying activity.

NOTE: THESE NOTIFICATIONS MUST BE FILED ONLY WITH THE OFFICIAL AND NOT WITH THE SECRETARY OF STATE.
Affirmations

Exclusive Lobbyists are required to file an online affirmation attesting to the accuracy of any expenditure reports filed with the Secretary of State, as those reports pertain to itemized expenditures made by the lobbyist. An affirmation is required for any lobbying entity with whom the lobbyist is or was registered as an exclusive lobbyist during the semi-annual period.

Affirmations will pertain to any of the semi-monthly expenditure reports or amendments filed by an employing lobbying entity during the periods of Jan. 1 through June 30 and July 1 through Dec. 31. Notification of impending filing periods will be emailed to each lobbyist and each entity’s Authorized Agent. Exclusive Lobbyists have 30 days from the date of the notice to file their Affirmation(s).

It is critical that Authorized Agents perform two important tasks in an effort to provide their lobbyists with the ability to file an accurate Affirmation:
• All semi-monthly expenditure reports must be filed.
• All lobbyists’ email addresses are current in the entity’s registration file.

Lobbyists may review expenditure reports filed by his or her entity at www.cyberdriveillinois.com:
• Select Lobbyist Activities.
• Select Lobbyist Information Search.
• Select Search.
• Select Expenditure Report Search and click Submit.

At the Expenditure Report Search screen:
• Select the registration year; type the employer/entity name and click Submit;
• Select and click on the Entity Name;
• Select View Expenditure for each semi-monthly report within the semi-annual affirmation period.

Lobbyists will have the resources available to compare his or her personal expenditure records with those reported to the Secretary of State by the Authorized Agent of the employer/entity. If the lobbyist’s personal records of expenditures and the expenditure reports match, the lobbyist is then ready to file his or her affirmation.

If the comparison of the lobbyist’s records and the employer’s expenditure reports indicate errors or omissions of expenditure information, the lobbyist must reconcile the error or omission with the Authorized Agent of the employer entity. Once reconciled, the Authorized Agent must amend the appropriate report. The lobbyist will then be able to file the Affirmation.

If the lobbyist needs additional time to acquire receipts, credit or debit card records or other expenditure information in order to file the Affirmation, a request for a filing extension must be made in writing to the Index Department at least two business days prior to the deadline for filing the Affirmation. The request for extension may be mailed to the Lobbyist Division, Index Department, 111 E. Monroe St., Springfield, IL 62756; or faxed to 217-557-8919; or emailed to elobbyist@ilsos.net. A request for an extension must include the name of the lobbyist, the employer/entity and a detailed reason for the need of an extension. Lobbyists receiving extensions will have the deadline extended by 45 days.

Lobbyists may access the Affirmation statement online at www.cyberdriveillinois.com:
• Select Lobbyist Activities;
• Select Mandated Filings for Exclusive Lobbyists;
• Enter your PIN ID and Entity ID in appropriate fields;
• Proceed with submitting Affirmation statement.
ELECTRONIC EXPENDITURE FILING INSTRUCTIONS

To file an Expenditure Report for a registered entity, visit the Secretary of State’s website at www.cyberdriveillinois.com:

- Select Lobbyist Activities.
- Select Lobbyist Registration and Expenditure Reporting.
- Select File.
- At the login page, enter the Authorized Agent’s User Name and Password.

Access to the expenditure filing system will be opened on the first day of each reporting period. The deadline is 11:59 p.m. on the last day of the filing period. There is no extension of a filing deadline when holidays or weekends are part of the filing period. The system is programmed to retain expenditure information as it is being entered during the filing period. Your file can serve as a data repository until all entries for the reporting period are completed and the Authorized Agent clicks Submit Expenditures to file the report.

NOTE: Entering and storing information in the expenditure system does not constitute a filing. The actual filing procedure must be executed by the required deadline or late fees will be assessed.

Updating registration files prior to filing the Expenditure Report is important. It is a requirement that the registration file be amended, if necessary, by adding or terminating exclusive lobbyists or clients whose status has changed since the last report. Such updates will automatically populate required fields in the Expenditure Report and make filing expenditures more convenient.

**Reporting Multiple Officials for Identical Expenditures**

Often, multiple state officials are the beneficiaries of the same or identical expenditures. This type of expenditure most frequently occurs when multiple officials are at the same dinner or event with a lobbyist and the expenditure is prorated equally. For example: A lobbyist and five legislators have dinner. The bill total for the meal is $120.60. The bill is divided equally by six, the number of attendees, resulting in an individual expenditure amount of $20.10.

In the past, each of the five legislators would be reported separately using an Itemized Expenditure Schedule and the Authorized Agent would be required to enter the expenditure data five times. Now, the expenditure data may be entered once, and the five legislators’ information may be entered.
Helpful Tips for Preparing to File

• Update the registration file for names of clients, contractual lobbyists and exclusive lobbyists who have been added or deleted since the previous report.
• Update the registration file for changes in email addresses.

For your convenience, please have the following information available for expenditure reporting:

Itemized Expenditures:
• Date of expenditure;
• Amount of expenditure;
• Category of expenditure;
  o Gifts
  o Gifts based on personal friendship
  o Honoraria
  o Meals, beverages and entertainment
  o Travel and lodging
  o Other: Any item or service of value that is not listed in the above categories.
• Name and job title of the official on whose behalf the expenditure is made;
• Official's employer;
• Name of lobbyist present;
• Type of lobbying – Executive, Legislative or Administrative;
• Subject matter of the lobbying;
  o HB123, SB789, HR456, etc.
  o Categorical subject, or
  o Goodwill
• Description of the expenditure;
• Purveyor or vendor of expenditure;
• Address or location of expenditure;
• Name of client who benefitted from the expenditure.

Large Gatherings:
• Date of expenditure;
• Total amount of expenditure;
• Estimated number of attendees;
• Estimated number of officials attending;
• Brief description of the event (150 characters).

Giveaways:
• Date of the expenditure;
• Total amount of the expenditure;
• Estimated number of officials receiving the item;
• Brief description of the item(s) given to officials (150 characters).

Grass Roots Expenditures:
• Date and the amount of expenditure;
• Category of expenditure;
• Name of official who is the recipient of the expenditure;
• Name, address and phone number of person making the grass roots expenditure.
Welcome to the Illinois Lobbyist System

Log In

Notice To All Lobbying Entities And Lobbyists
The Lobbyist Registration and Expenditure Reporting Systems have a new look to the registration and reporting formats. We are aware of the benefits of maintaining continuity in our user-friendly system, therefore the changes are mostly visual, and the functioning of the web pages for your registration and reporting tasks are virtually unchanged.

As always, you are encouraged to be familiar with the Lobbyist Registration Guide and the Expenditure Reporting Guide in order to maintain compliance with the Lobbyist Registration Act, and avoid filing errors and unnecessary late fees.

Most important items for your review include:
• Expenditure reporting on a semi-monthly schedule.
• Expenditures’ itemization, regardless of amount.
• Ethics training publication for all lobbyists.
• Prohibition of Sexual Harassment training publication.
• Affirmation of expenditure reports by lobbyists.
• Termination Requirements for registered Exclusive Lobbyists.

The Secretary of State's online lobbyist maintenance system provides lobbying entities and individual lobbyists periodic informational notices via email. It is important that changes in email addresses are immediately updated by amending lobbyist registration files. Please remember that lobbyist registration is a public document. Any lobbyist who does not want his or her home address, home email address or home phone to be listed publicly should provide workplace or other alternate contact information.

If you are a new authorized agent, register now.

User Name

Password

Forgot your User Name or Password?

Submit

To login to the Illinois Lobbyist System:

- Enter User Name,
- Enter Password,
- Click Submit.

If you have forgotten your User Name and Password, select Forgot your User Name or Password? Enter the email address registered to the Authorized Agent. The information will only be returned to the registered email address of the Authorized Agent.

If during the expenditure reporting process a period of inactivity by the user occurs, the system will automatically timeout and close.
Select Entity

To select the entity for which an expenditure report needs to be filed:

- Click the button beside desired **Company Name**,  
- Select **Year***,  
- Click **Continue**.

**NOTE:** Be sure to select the correct year for the expenditure filing.
Authorized Agent Menu

All expenditure filings are accessed through this menu, including Original and Amended reports.

- Click *Expenditures*. 
Select Expenditure

Enter expenditure reports by clicking on the Create button. If expenditure records have been entered, but not yet submitted, the button will appear as Continue. Once expenditure records have been submitted, the button will appear as Amend.
Expenditure Reporting Menu

If there were no reportable expenditures made during the reporting period, click Continue and proceed to page 25.

If there are expenditures to report, click Add next to expenditure type that should be reported. If you need to amend previously entered records, click Modify next to the expenditure type to be amended. Proceed to pages 14-23 for specific Expenditure Schedule instructions.
See instructions on next page.
Itemized Schedule Instructions

This schedule is used for reporting any single expenditure made on behalf of an Official. The following information must be provided for each expenditure record:

- Enter expenditure date and amount;
- Select expenditure category;
- Select the name of the lobbyist who made the expenditure;
- Select type(s) of lobbying action;
- Enter subject matter;
- Enter description of expenditure;
- Enter vendor name;
- Enter vendor address or location (e.g., Capitol Bldg., Soldier Field, Rend Lake State Park);
- Enter vendor city and state;
- Select official’s employer;
  (Follow all steps through the agency, title, and name of Official.)
- Click Add Official; (If multiple officials equally benefit from the same expenditure, continue to enter the information for the additional official(s) and click Add Official after each entry.)
- Click Save and Continue.
Itemized Schedule (continued)

Use this screen to indicate all clients who were beneficiaries of the itemized expenditure.

- Click button beside the **Entity ID** of each client,
- Click **Save**.

**NOTE:** If your entity does not list any clients, only your registered entity’s name is available to be selected as a beneficiary.
Itemized Records View Screen

Review each entered record.

- If record information needs to be changed, click *Edit*.
- If record needs to be removed, click *Delete*.
- If an additional expenditure record must be reported, click *Add*.
- If all itemized expenditure records are complete, click *Return to Reporting Menu* to add additional types of expenditure records and/or proceed to the Expenditure Summary Report.
Large Gatherings Schedule

This schedule is used when expenditures are incurred for hosting a reception or benefit to which 25 or more Officials are invited.

- Enter Expenditure Date of the event;
- Enter total Expenditure Amount;
- Enter Estimated Number of Attendees;
- Enter Estimated Number of Officials Attending;
- Enter brief Description of the gathering;
- Click Save.
Review each entered record.

- If record information needs to be changed, click Edit.
- If record needs to be removed, click Delete.
- If an additional expenditure record must be reported, click Add.
- If all Large Gatherings expenditure records are complete, click Return to Reporting Menu to add additional types of expenditure records and/or proceed to Expenditure Summary Report.
Giveaways Schedule

This schedule is used when expenditures are incurred for generic gifts, product samples or substantially identical items given to 25 or more officials.

- Enter Expenditure Date;
- Enter total Expenditure Amount;
- Enter Estimated Number of Officials Receiving Giveaway;
- Enter brief Description of the giveaway;
- Click Save.
Giveaways View Screen

Review each entered record.

- If record information needs to be changed, click Edit.
- If record needs to be removed, click Delete.
- If an additional expenditure record must be reported, click Add.
- If all Giveaway expenditure records are complete, click Return to Reporting Menu to add additional types of expenditure records and/or proceed to Expenditure Summary Report.
Use this statement to report an expenditure made by an individual as a result of a Grass Roots communication or event sponsored by the registered entity. These statements allow member organizations or individual members to make and report expenditure(s) through the registered umbrella organization without having to register themselves as lobbyists.

The following information must be provided for each expenditure record:

- Enter Expenditure Date and Expenditure Amount;
- Select Expenditure Category;
- Select Official’s Employer;
  (Follow all steps through the Agency, Title and Name of Official.)
- Enter Name, Address and Phone Number of Grass Roots Lobbyist who made the expenditure;
- Click Save.
Review each entered record.

- If record information needs to be changed, click Edit.
- If record needs to be removed, click Delete.
- If an additional expenditure record must be reported, click Add.
- If all Grass Roots expenditure records are complete, click Return to Reporting Menu to add additional types of expenditure records and/or proceed to Expenditure Summary Report.
After all expenditure records or amendments have been entered on the appropriate schedules, click *Continue.*
Expenditure Summary Report

This report summarizes all reported expenditure amounts by category. The totals are automatically calculated based on the amounts entered on each of the expenditure schedules.

Please verify that the amount reflected is correct. If changes are necessary, click Return to Reporting Menu to access the schedules to be corrected. If all records are complete and the amounts are correct, click Submit Expenditures.


An expenditure report is not considered filed until the Submit Expenditures button has been clicked and the information has been sent to the system.
Expenditure Filing Receipt

This screen serves as your receipt of the filed report. Please select Print Receipt to keep a copy for your records. The Index Department is unable to reproduce this screen again for the Authorized Agent.

Print Expenditure Filings enables you to obtain copies of all filed expenditure reports and schedules. After retrieving your printable copies, close the box and return to receipt screen.

The reports will print in the following order:
- Expenditure Summary Report;
- Itemized Schedule;
- Large Gatherings Schedule;
- Giveaways Schedule; and
- Grass Roots Lobbying Statement.

To complete additional transactions for this entity or for other entities, click Return to Authorized Agent's Entity List.

If transactions are complete, select Logout in the upper-right corner.
LISTING OF OFFICIALS REQUIRED TO REPORT

The following is a list of positions and position titles deemed to be “Officials” for reporting purposes under The Lobbyist Registration Act (25 ILCS 170).

MEMBERS OF THE GENERAL ASSEMBLY

CONSTITUTIONAL OFFICERS

Governor
Lieutenant Governor
Attorney General
Secretary of State
Comptroller
Treasurer

ATTORNEY GENERAL’S OFFICE

Chief Deputy Attorney General
Chief of Staff
Counsel to the Attorney General
Deputy Attorney General/Child Support Enforcement
Deputy Attorney General/Civil Litigation
Deputy Attorney General/Criminal Justice
Deputy Attorney General/Springfield & Regional Coordination
Deputy Chief of Staff/Administration
Deputy Chief of Staff/Policy & Legislative Affairs
Senior Counsel to the Attorney General
Solicitor General

COMPTROLLER’S OFFICE

Assistant Comptroller – Fiscal Policy
Assistant Comptroller – Operations
Assistant Comptroller – Policy & Planning
Chief of Staff
Deputy Director of Legal Affairs
Director of Administrative Services & Budget
Director of Cemetery Care & Burial Trusts
Director of Communications
Director of Financial Reporting
Director of Human Resources
Director of Information Technology
Director of Internal Audits
Director of Issues Development
Director of Legislative Affairs
Director of Local Government
Director of Research & Fiscal Information
Director of State Accounting
Legislative Liaison
Press Secretary
Purchasing Agent

SECRETARY OF STATE’S OFFICE

Chief Auditor
Deputy Chief Auditor
Deputy Chief of Staff
Deputy Director of Intergovernmental Affairs
Deputy Secretary of State/Chief of Staff
Director of Intergovernmental Affairs
Director of Policy and Programs
General Counsel
Inspector General
Press Secretary

Directors, Chief Deputy Directors and Deputy Directors of the following departments:

- Accounting Revenue
- Administrative Hearings
- Archives
- Budget and Fiscal Management
- Business Services
- Communications
- Court of Claims
- Driver Services
- Index
- Information Technology
- Legislative Affairs
- Library
- Personnel
- Physical Services
- Police
- Securities
- Vehicle Services

TREASURER’S OFFICE

Chief Internal Auditor
Chief of Staff
Chief Procurement Officer
Deputy Chief of Staff for Administration
Deputy Chief of Staff for Programs
Deputy Director of Legislative Affairs
Deputy Press Secretary
Deputy Treasurer/Chief Fiscal Officer
Director of College Savings
Director of Communications
Director of Community Affairs
Director of Financial Education
Director of Human Resources
Director of Illinois Funds
Director of Information Technology
Director of Invest in Illinois
Director of Legislative Affairs
Director of Marketing
Director of Scheduling and Advance
Director of Technical and Support Services
Director of Unclaimed Property
General Counsel
Manager of Accounting
Manager of Banking
Manager of Warrant
Portfolio Manager
Press Secretary
GOVERNOR'S OFFICE
Chief of Staff
Deputy Chief of Staff - Economy & Labor
Deputy Chief of Staff - Education
Deputy Chief of Staff - Intergovernmental Affairs
Deputy Chief of Staff - Legislative Affairs
Deputy Chief of Staff - Operations
Deputy Chief of Staff - Public Safety
Deputy Chief of Staff - Social Services
Deputy Governor
Director of Communications
Director of Office of Management & Budget
Director of Policy Development
General Counsel

CODE DEPARTMENTS:
Directors, Assistant Directors and General Counsel of the following agencies:
Aging
Agriculture
Central Management Services
Children and Family Services
Commerce and Economic Opportunity
Corrections
Employment Security
Financial and Professional Regulation
Healthcare and Family Services
Human Rights
Human Services **
Illinois Power Agency
Insurance
Juvenile Justice
Labor
Natural Resources
Public Health
Revenue
State Police
Transportation **
Veterans Affairs

** Secretary, Assistant Secretary and General Counsel of these agencies.

NON-CODE DEPARTMENTS:
Directors, Assistant Directors and General Counsel of the following agencies:
Emergency Management Agency
Environmental Protection Agency
State Fire Marshal
Historic Preservation Agency
Military Affairs ***

*** Adjutant General, Assistant General and Judge Advocate General of this agency.

BOARDS, COMMISSIONS, TASK FORCES AND AUTHORITIES:
Members, Executive Directors and General Counsel of the following:
Boiler and Pressure Vessel Rules Board
Capital Development Board
Carnival-Amusement Safety Board
Charitable Trust Stabilization Committee
Chicago Transit Authority Board
Civil Service Commission
Commerce Commission
Comprehensive Health Insurance Board
Conservation Foundation
Court of Claims
Credit Union Advisors Board
Currency Exchange Advisors Board
Downstate Illinois Sports Facilities Authority Board
Education Labor Relations Board
Environmental Health Practitioners Board
Executive Ethics Commission
Gaming Board
General Assembly Retirement System, Board of Trustees
Health Facilities and Services Review Board
Higher Education, Board of Historic Preservation Agency, Board of Trustees
Hospital Licensing Board
Human Rights Commission
Illinois Arts Council
Illinois Finance Authority
Illinois Global Partnership, Inc., Board of Directors
Illinois Housing Development Authority
Illinois Juvenile Justice Commission
Illinois Math and Science Academy, Board of Trustees
Illinois Medical District Commission
Illinois Public Safety Agency Network, Inc., Board of Directors
Illinois State Board of Investment
Illinois State Toll Highway Authority
Illinois Student Assistance Commission
Illinois Workers Compensation Commission
Joint Committee on Administrative Rules
Judges' Retirement System, Board of Trustees
Labor Relations Boards, State and Local
Liquor Control Commission
Local Records Commission
Lottery Control Board
Merit Commission for the Office of the Comptroller
Merit Commission for the Secretary of State
Metropolitan Pier and Exposition Authority
Motor Vehicle Review Board
Personnel Review Board for the Treasurer
Pollution Control Board
Prisoner Review Board
Property Tax Appeal Board
Purchased Care Review Board
Racing Board
Savings Institutions Board
Small Business Utility Advocate
Sports Facilities Authority Board
State Board of Education
State Board of Elections
State Employees’ Retirement System, Board of Trustees
State Mining Board
State Police Merit Board
State Universities Retirement System, Board of Trustees
Teachers’ Retirement System, Board of Trustees
Workforce Investment Board
FOR ADDITIONAL INFORMATION

For additional information about lobbyist expenditure reporting, please call the Secretary of State’s Index Department at 217-782-7017. Index Department hours are Monday through Friday, 8 a.m. to 4:30 p.m., except official state holidays. You can contact the Index Department via email by selecting Contact Us at the top of each screen in the electronic lobbyist system.